

**2017 Annual Assessment Report (AAR) Checklist**

Municipality:				Muni Code		Date:		
Assessor:				DOR Reviewer				
		Full Revaluation:		:Exterior Reval		Int Mrkt Update:		
Not required, suggested		Required if Applicable		Required				
Pre-filled data		Partial requirement		Not Required		NOTES and Attachments not Required		
AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes			
Page 2- Assessment Information	Verify Assessment Type and Historical Assessment Type, Software Vendor, comment if Software is not supported			Assessment Type				
				Historical				
				Software				
				Year of last Update				
Page 2 Estimated Level of Assessment	Line populated ?			Percent				
Page 2 Assessment Help	Did the assessor list help ?			Names				
Page 2 Check Box #1	Additional staff provided as attachment ?			Attachment				
<b>SECTION 1 General Municipality Information</b>								
Page 3 Municipality description	General description adequate ?			TEXT				
Page 3 Box #2	Section 1 general description attachment		x	Attachment				
<b>SUMMARY OF REQUIREMENTS</b>								
Page 3	DATES							
	1. Assessors oath							
	2. Mailed Notice of Assessment							
	3. Signed Affidavit/attached roll							
	4. Submitted to DOR							
	ECR							
	MAR							
	TAR							
	5. Corrections and omissions discovery							
	Discovered, corrected omitted property			YES NO or NA				
	Provided property owners with written notice of appeal rights			YES NO or NA				
	6. Open Book Information							
	Date of First Open Book			DATE				
	Number of Parcels Reviewed							
	Revised Notices Sent			YES NO or NA				
	7. Board of Review Information							
	Date of first BOR			DATE				
	Reschedule date if needed			YES NO or NA				
	Assessor attended BOR ?			YES NO				
	8. Palpable errors or omitted parcels:							
	Reviewed and reval property in error and cert. value with clerk			YES NO or NA				
	Verified with clerk, palpable error or omitted property was added to roll			YES NO or NA				
	9. Property inspection:							
	Number field inspected			Number				
	Inspection (interior, exterior, drive-by)			Type				
	Page 4	10. Property Sales			Number			
	Page 4	11. Valid Sales						
		Reviwed for Validity			Number			
		Total Number of Valid Sales			# of sales on page 7			
		Number Inspected			Number			
12. Conducted ratio study for:								
Previous assessment date				YES NO NA				
Current Assessment Date				YES NO NA				
13. Building permits:								
Total number of building permits				Number				
Number field inspected				Number				
14. New Construction:				Number				
Number of inspections:				Number				
Analyzed new construction				YES NO NA				
15 Agricultural parcels				Number				
Total number of parcels				Number				
Total number of inspections				Number				
Type of inspections				Number				
On-site				Checkboxes				
Drive -by				Checkboxes				
On-line Maps, etc.				Checkboxes				
16. Updated Ag Values with DOR values adjusted to assessment level				YES NO NA				
17. Income producing properties								
Collected Income and expense data				YES NO NA				
Calculated from market or obtained from credbile sources				YES NO NA				
18. Personal property:								
Discovered				YES NO NA				
Date returns sent				DATE				
Valued				YES NO NA				
<b>SECTION 2-Scope of Work</b>								
Page 5		Class 1			PARCEL COUNT	Percent by Full Revaluation Exterior, Interim market update		
	Class 2							
	Class 4							
	Class 5							
	Class 5 m							
	Class 6							

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AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes		
	Class 7						
	Personal Property						
Page 6	Scope of Work Notes			TEXT			
Page 6 Box #3	Box #3 Scope of work as an attachment			Attachment			
<b>Section 3- Assessment Statistics</b>							
Page 7	Number of Valid Sales				NOTE: 2015 data pre-filed if applicable		
	Total assessment of valid sales parcels						
	Total Sales Price of Valid sales Parcels						
	Aggregate ratio						
	Mean						
	Median						
	Coefficient of Dispersion						
	COC						
	PRD						
Page 7 Statistics Notes:	Did assessor provide notes ?						
Page 7 Box #4	Check box Section 3 Statistics Notes ?						
<b>Section 4-Valuation</b>							
Valuation Summary Page 8	Residential			Percent			
	Commercial			Percent			
	Agricultural			Percent			
	Undeveloped			Percent			
	Agric Forest			Percent			
	Prod Forest			Percent			
	Other			Percent			
	P1- Boats and other watercraft			Percent			
	P2- Machinery, tools, patters			Percent			
	P3- Furniture, fixtures,equipment			Percent			
	P4A-Other			Percent			
	P4-B Buildings on Leased Land						
	Mobile Homes			Number			
Page 9 Analysis of Local Trend	Number of sales-verify with Page 7			Number/Dates			
Page 9 Methods used to determine the market trend	Did the assessor check a box for the methods used to determine a trend ?			Outside sources			
				Square Foot			
				Paired Sales			
				Regression			
				Insufficient sales			
Page 9 Dates and % per year	Provide % influencing class of property ?			Other Explain			
				Residential %			
				Commercial%			
Page 9 Trend Explantion Text Box	Narrative ?			Text Box			
Page 9 Box #5 Section 4 Trends	Check box #5, attachments present ?			Attachments			
<b>Section 5-Land Valuation</b>							
Page 10 B Land sales by class	If land sales NOT provided check X in NO						
Page 10 B Vacant Land Sales by Class Code	Did the assessor provide a number of vacant land sales ?			Residential #			
				Commercial #			
				Agricultural #			
				Undeveloped #			
				Ag Forest #			
				Prod Forest #			
Page 10 Land Appraisal Methods:	Note method used and make comments			Check Box	Seven Methods and Other		
Page 11 Value Range Land	Unit values, square foot, acres for Class of Property			Unit value range for 7 types	Class 1 Class 2 Class 4 Class 5 Class 5m Class 6 Class 7		
<b>Influence Factors</b>							
Page 12 Influence Factors by Class Type	NOT having a reason for influences in a neighborhood or jurisdiction is something to comment on			NOTES	Residential		
				NOTES	Commercial		
				NOTES	Agricultural		
				NOTES	Undeveloped		
				NOTES	Agri Forest		
				NOTES	Prod Forest		
				NOTES	Other		
Page 12 Land Valuation Notes	Narrative on how land is valued?			NOTES			
Page 12 Box #6 Attachment	Check box #6 Land Valuation data Notes ?			Attachment			
<b>Page 12-13 Section 6 Improved Property Valuation</b>							
Page 12 Cost Approach	Techniques used to determine model specification. Systems must be capable of creating a cost value for comparrison			Volume II			
				Marshall Valuation			
				Own Model			
				Other cost-identify			
Page 12 Specification	Explain specifications of cost techniques			Text Box			
Page 12 Check Box #7	Check box 7? 6A-1 cost attachments			Check Box with attachments			
				Vol II check box			
				Marshall Check Box			

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AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes		
Page 13 Techniques used to determine model calibration	Sales comparison model validated?			Own Cost Check Box			
				Validated VII multiplier			
				Developed own depreciation tables			
Page 13 Calibration Text Box	Notes in the Text Box?			Text Box			
Page 13 Check Box #8	Attachment: 6A 2 Cost calibration			Attachment			
Page 14 Cost Approach Notes	Cost approach notes provided?			Text Box			
Page 14 Specification Attachments labeled Section 6A. 3-4 Cost Approach Notes	Did the assessor check a box # 9 and include attachment Section 6A 3-4 Cost Approach Notes			Attachment			
Page 14 Sales Specifications	Which box was checked			Check Boxes	Sales Comparison		
					Multiple regression analysis		
					Other Explain		
					Not applicable-insufficient sales		
Page 14 Model Specification	Were model specifications provided?			Text Box			
Page 14 Check Box #10	Check box #10 Section 6B.1 Sales Comparison Approach Specification ?			Attachment			
Page 14 Sales NOT used	Comments on the Sales NOT used ?			Text Box			
Page 14 Check Box #11	Is the Box #11 checked Section 6B, 1a Sales Not Used ?			Attachment			
<b>Page 15 Calibration</b>							
Page 15 Calibration	Were Calibration Techniques Identified	Check Boxes					
				Sales listing property attributes			
				Sales comparables			
				Multiple regression analysis			
				Other			
				NA, Insufficient Sales			
Page 15 Calibration Explanation	Notes on Calibration Provided ?			Text Box	Explanation provided does not detail process		
Page 15 Text Box #12	Section 6B.2 Sales Calibration			Attachment			
Page 15 (3) Sales validation	Check box validating sales model ?			Check Box	Comparing estimates - model to sales price		
					Other		
					NA/Insufficient sales		
Page 15 Sales Notes	Notes provided on sales comparison			NOTES			
Page 15 Check Box #13	Section 6B.3-Sales Validation			Attachment			
<b>Page 16 Income Approach</b>							
1.) Specifications Income Approach	Are boxes checked ?			Check Box	Direct Capitalization		
					Yield Capitalization		
					Other		
					NA		
2.) Calibration Income Approach	Are boxes checked ?			Check Box	Data from Market		
					Data from Professional sources		
					Other		
					NA		
3.) Validation	Are boxes checked ?			Check Box	Comparing estimates - model against sales price		
					Other		
					NA-insufficient sales		
Page 16 Income Approach Notes	Notes on Income Approach Provided ?			Notes			
Page 16 Box #14	Section 6C Income attachment ?			Attachment			
<b>Page 17</b>							
Page 17 Additional Comments	Are there additional comments ?			Notes			
<b>ATTACHMENT LIST</b>							
<b>All assessment types-required attachments</b>				<b>Any assessment type – optional attachments</b>			
<ul style="list-style-type: none"> <li>• Affidavit</li> <li>• Assessment notice</li> <li>• Name(s) of help</li> <li>• PRC sample(s)</li> </ul>				<ul style="list-style-type: none"> <li>• BOR notice</li> <li>• Contract</li> <li>• Map(s)</li> <li>• Summary of Open Book Actions (Form PR-130)</li> <li>• There is no limit to the number of attachments you provide with your report</li> </ul>			
<b>Revaluations and interim market update-required attachments</b> <ul style="list-style-type: none"> <li>• Revaluation notice</li> <li>• Sales used</li> <li>• Sales not used</li> <li>• Valuation analysis (cost, income, sales)</li> </ul>				Comments:			